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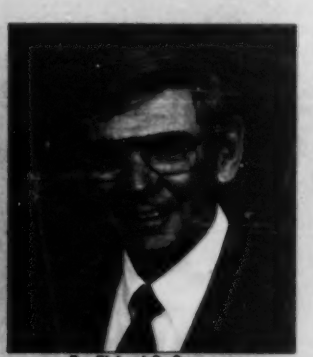

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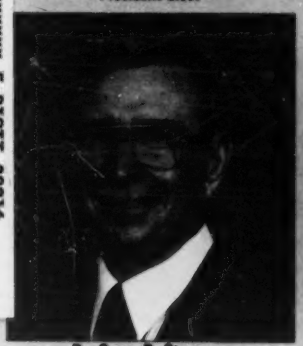

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BPA

Veterinary Service Market for Companion Animals, 1992
Part II: Veterinary service use and expenditures

This is the second of a 2-part series summarizing findings from the complete report available from the AVMA Center for Information Management.

In 1992, the AVMA Center for Information Management conducted a nationwide study of 80,000 US households to update, expand, and report information on the companion animal market for veterinary medical services. The response rate was 68.9%, and the respondent group was analyzed and determined to be a representative sample of US households. Detailed results of this study are included in the report entitled *Veterinary Service Market for Companion Animals, 1992*.

The estimated population of companion animals and a demographic profile of pet owners were reported in a previous article.[1] Use of veterinary services, frequency of veterinary visits, and veterinary medical expenditures are reported here.

Use of Veterinary Services

Analysis focused on use of veterinary medical services, including whether the pet owner had a veterinarian, reasons for selecting a veterinarian, services and products provided, level of satisfaction, and the pet owner's opinion regarding the best source of health care knowledge and advice regarding his/her type of pet.

From the AVMA Center for Information Management: J. Karl Wise, PhD, Director; Jih-Jing Yang, PhD, Research Analyst.

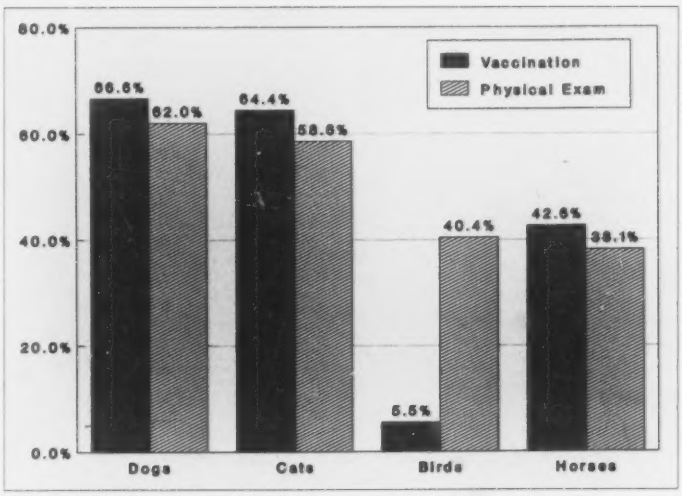

Figure 1—Services provided at last veterinary visit, 1991.

It was determined that 79.6% of dog owners, 70.2% of cat owners, and 67.9% of horse owners had a veterinarian. Only 21.0% of bird owners indicated that they had a veterinarian. These findings imply that at least 20% of dog, cat, and horse owners, and nearly 80% of bird owners do not currently have a veterinarian. The veterinary medical profession, through additional market segmentation analysis and strategic marketing, has the potential to reach these animal owners and expand the delivery of services.

For each type of companion animal owned, respondents were asked about the services and products that were provided during the last visit with the veterinarian. Although many types of services and products are provided by veterinarians, Figure 1 shows that physical examinations and vaccinations were the most commonly provided services. Approximately 62% of dog owners, 59% of cat owners, 40% of bird owners, and 38% of horse owners indicated that a physical examination was provided at the animal's last veterinary visit. With the exception of birds, slightly higher percentages of owners indicated that the animal was vaccinated at the last visit.

Further analysis revealed that 90.5% of dog owners, 90.7% of cat owners, 87.0% of bird owners, and 93.6% of

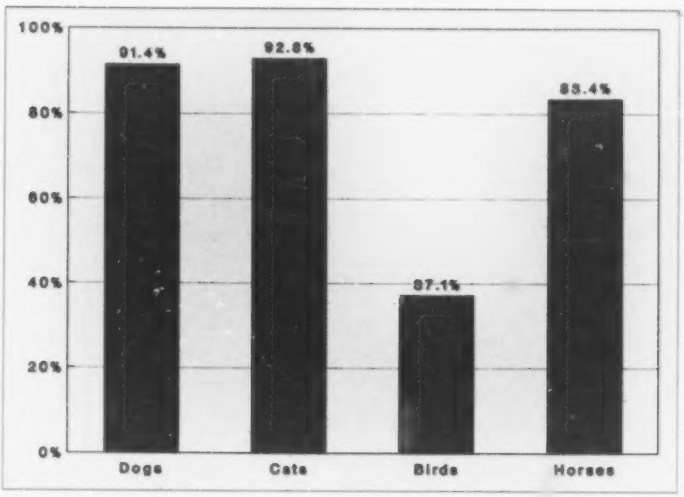

Figure 2—Veterinarian as the best source of health care knowledge and advice, 1991.

Table 1—Households obtaining veterinary care, 1987, 1991

Pet	Households obtaining veterinary care (%)		Mean veterinary visits per household (No.)	
	1987	1991	1987	1991
Dog	77.6	82.3	2.37	2.64
Cat	59.5	62.4	1.62	1.78
Bird	7.6	10.6	0.15	0.22
Horse	47.4	53.6	1.85	2.40
Other	9.9	10.3	...	...

horse owners were satisfied with the last veterinary visit.

These findings, suggesting high use of preventive medical services and high levels of satisfaction with services provided by veterinarians, confirm that veterinarians and companion animal owners have developed excellent rapport and responsible health care programs for companion animals.

Companion animal owners also were requested to indicate whether the breeder, pet store, trainer, or veterinarian was their best source of health care knowledge and advice. Figure 2 shows that over 90% of dog and cat owners and approximately 83% of horse owners indicated that the veterinarian was the best source of health care knowledge and advice.

On the other hand, < 4 of 10 bird owners ranked the veterinarian as the best source of health care knowledge and advice. At least 4 of 10 bird owners regarded the pet store as the best source of health care advice. Coupled with the fact that nearly 80% of bird owners reported not having a veterinarian, these findings reveal that the veterinary medical service market for birds represents a significant marketing challenge for the profession.

Veterinary Service Visits and Expenditures

All companion animal owners were requested to indicate the number of times their animals were seen by a veterinarian in 1991. If a respondent owned 2 dogs and each dog was seen twice during the year, the respondent was instructed to report 4 visits.

Table 1 shows that for dogs, cats, birds, and horses, the proportion of households obtaining veterinary care in 1991 increased from 1987.[2] Specifically, 82% of dog-owning households, 62% of cat-owning households, nearly 11% of bird-owning households, and nearly 54% of horse-owning households obtained veterinary care in 1991.

Table 2—Mean veterinary service expenditure per household, 1987, 1991

Pet	1987 ($)	1991 ($)
Dog	82.68	131.84
Cat	54.28	79.75
Bird	4.47	34.24
Horse	120.75	163.23
Other	7.74	9.05

Not only did increased proportions of companion animal owners obtain veterinary care in 1991, but they obtained veterinary care more times in 1991 (Table 1). Mean veterinary visits per household for dogs was 2.64 visits per year in 1991, up from 2.37 visits per year in 1987. For cats, mean veterinary visits per household was 1.78 visits per year in 1991, up from 1.62 visits per year in 1987. Mean visits per household for birds was 0.22 visits per year in 1991, up from 0.15 in 1987. For horses, mean visits per household was 2.40 visits per year in 1991, up from 1.85 in 1987.

Total veterinary expenditures in 1991 were estimated for each type of companion animal owned by the household. In 1987, veterinary expenditures also were estimated, but were calculated differently (ie, veterinary expenditures for each type of pet were calculated from data for households owning one type of pet exclusively). In the 1992 study, households reported annual veterinary expenditures for each type of pet owned. This method is believed to provide a more accurate estimate of veterinary expenditures in 1991.

Consistent with increased visits per household, dog-owning households spent more at the veterinarian in 1991 than in 1987. Mean veterinary expenditure for dogs per dog-

owning household was $131.84 in 1991, up from $82.68 in 1987 (Table 2). Mean 1991 veterinary expenditures were $79.75 for cat-owning households, $34.24 for bird-owning households, and $163.23 for horse-owning households.

On the basis of estimated veterinary expenditures and the number of animal-owning households in the United States, one can estimate the total expenditures for veterinary services for dogs, cats, birds, and horses owned by households in the United States. Veterinary expenditures in 1991 were nearly $4.6 billion for dogs, approximately $2.3 billion for cats, $185 million for birds, and $314 million for horses.

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2. Troutman CM. *The veterinary services market for companion animals, 1988*. American Veterinary Medical Association. Overland Park, Kan: Charles, Charles Research Group, August, 1988.

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